



Union Members Helping Union Members

Who we are:

We offer businesses, individuals and institutional clients a wide range of financial products and services. Our Team consists of Financial Professionals who are also Local Union 193 members. Over the past 10 plus years, we have worked one on one incorporating your benefits with your individual retirement planning.

“We strive to personalize your investment plan according to your comfort and risk level.”

Pre- Retirees:

- Retirement Planning- From Hire Date to Retire Date
- Work with members one on one to create their own investment and income plan
- Risk Management / Investment Strategies
- Asset Allocation/ Diversification; review your 401(k)
- Have a plan designed to protect your retirement income
- Risk and Insurance Planning

Near Retirement:

- Analyze your financial readiness for retirement
- How to incorporate your benefits into your retirement planning.
- Techniques to Maximize your Pension
- Survivor Income Protection

After Retirement:

- Monitor your plan
- Review and adjust plan over time
- Planning is not a “set and forget it” strategy.

Please Contact us at (833) 908-2042

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